

NEW SOUTH WALES.

BUSINESS STATISTICS OCTOBER, 1943.

C O N T E N T S.

PART I	<u>PRIMARY & EXPORT INDUSTRIES.</u> ✓
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As a further measure in preparing for peace the Federal Government has set up within the Ministry of Post-War Reconstruction the "Secondary Industries Planning Commission". The Commission's main tasks will be to study wartime industrial development (particularly Government factories) and define a policy of industrial development. Close contact with industry is to be achieved by the appointment of "Industry Advisory Panels". The Tariff Board will conduct enquiries on behalf of the Commission.

The "Textile Advisory Panel" has been appointed to advise the Commission in relation to woollen, cotton and artificial fibres and materials and knitted wear. It will recommend as a matter of urgency the provision of research facilities in Australia, including the establishment of a textile college.

The new posts of Australian High Commissioner in India and New Zealand have been created.

PART I - PRIMARY AND EXPORT INDUSTRIES.

Seasonal Conditions. Coastal dairying districts received further good rains in October but in wheat and sheep districts rainfall was less than average. The pastoral outlook is generally very favourable in the eastern half of the State; in the west pastures are drying off rapidly.

RAINFALL INDEX - N.S.W.

Weighted average ratio of actual to normal rainfall.
Normal rainfall each month = 100.

Period	Sheep	Wheat Districts	Dairying (Coastal) Districts
Year 1942	111	110	97
1943-Jan.	141	138	75
Mar.	15	17	44
May	124	118	216
June	51	53	25
July	67	83	6
Aug.	105	103	156
Sept.	116	122	128
Oct.	90	83	147

Food Production objectives for Australia in 1943-44 are shown below against production realised in 1942-43. Of the products scheduled only wheat, barley and sugar are expected to decline.

AUSTRALIAN FOOD OBJECTIVES FOR 1943-44.

Item	Quantity	1942-43 Production	1943-44 Objective	Increase + or Decrease -
		000	000	%
Milk for all purposes	000 gals.	1,163 (a)	1,210	+ 4
Butter	tons	171	175	+ 2
Cheese	tons	35	45	+ 27
Beef and Veal	tons	538	540 (b)	--
Mutton and Lamb	tons	415	475 (b)	+ 14
Pig Meats	tons	78	110 (b)	+ 41
Wheat	bushels.	155,728	100,000	- 36
Barley	bushels.	8,180	8,000	- 2
Rice	tons	57	64	+ 12
Sugar	tons	626	570	- 9
Peanuts	tons	6	13	+ 117
Potatoes	tons	475	529	+ 11
Blue Peas	bushels	452	600	+ 33

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				2.
Item	Quantity	1942-43 Production	1943-44 Objective	Increase + or Decrease -
		000	000	%
Green Peas	tons	26	72	+ 177
Navy Beans	tons	3	5	+ 67
Tomatoes	tons	72	163	+ 126
Other Vegetables for Human consumption.	tons	475	502	+ 6

(a) Preliminary. (b) Calendar year 1944.

Eggs. To encourage egg production, persons keeping up to 40 hens for the production of eggs for sale have been exempted from control by the Egg Marketing Board. Previously the exemption applied to flocks of 20 hens.

Dried Fruits. So that the production of dried fruits may be increased restrictions are to be placed on the use of certain varieties of grapes in wineries. The Australian production target for dried vine fruits in 1943-44 is 95,000 tons. The estimated production in 1942-43, was 89,500 tons (currants 21,100, sultanas 59,000, lexias 9,400) and the estimated exports 65,000 tons and home consumption 24,500 tons.

Apples and Pears. The Apple and Pear Board is to acquire the 1944 season's crops in Western Australia and Tasmania. Acquisition in these States in 1943 is expected to result in a deficiency not exceeding £320,000.

WHEAT.

The "Harvest Workers Award", to operate from 15th November, 1943, to 30th June, 1944, has been issued by the Federal Arbitration Court. The effects of the award upon costs in the wheat industry are being investigated by a committee appointed by the Commonwealth.

MEAT.

As a preliminary to the introduction of rationing in January next, meat and all goods made wholly or partly from meat have been declared rationed goods. According to an announcement by the Prime Minister the ration scale will be $1\frac{1}{8}$ lb. of butcher's meat a week for each child aged nine years on 13th June, 1943, and $2\frac{1}{4}$ lbs. for persons aged more than nine. This will absorb half the estimated meat production; the remaining half will be allotted to the Australian, British and Allied forces and for export to Britain.

Veal has been brought under the "quota" system which at present regulates the distribution of meat among civilians. Under new "quotas" retail butchers' purchases in the Sydney and Newcastle districts may not exceed 75% of their overall supplies in April, 1943. Beef "quotas" in both Sydney and Newcastle are 40% of April beef purchases (increased from $33\frac{1}{3}$ % in Sydney) and the balance of the 75% overall quota may be taken in mutton, lamb and veal in any desired proportions. In country districts sales quotas have been fixed on the basis of sales in April, 1943, viz., mutton and lamb 100%, beef and veal 50%.

The retail prices of certain cuts of meat were reduced following reductions in wholesale prices a short time ago. Reductions are: Ribs of beef and gravy beef 1d. per lb; Sirloin beef and steak, lamb shoulders, legs, forequarters and hindquarters $\frac{1}{2}$ d. per lb.

DAIRY INDUSTRY.

Butter production in N.S.W. factories increased by 50%, in September, 1943, as compared with the abnormally low production in August. This increase exceeded the seasonal movement in the previous three years but September production was still 17% below 1941 and 1942.

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With production increasing November "quotas" of butter and cheese reserved for local consumption were reduced to 41% and 42%, respectively. Quotas in October were 45% and 49%, and in November, 1942, 39% and 31%.

BUTTER PRODUCED - N.S.W. FACTORIES.

000,000 lb.

Period	Average 1935/37	1940.	1941.	1942.	1943.
Year ended June	121.1	112.0	103.7	85.1	93.8
Month - March	14.0	9.6	11.7	10.1	8.6
April	10.9	9.2	8.7	8.6	6.1
May	7.7	7.3	6.8	6.8	4.8
June	5.2	5.1	5.2	5.5	3.7
July	4.6	5.0	4.6	5.2	3.3
August	5.1	5.0	4.6	5.3	3.3
September	6.9	6.4	5.8	5.9	4.9

Pay by certain North Coast factories to cream suppliers in September, 1943, was at the rate of $13\frac{3}{4}$ d. per lb. of commercial butter, plus $3\frac{1}{4}$ d. interim subsidy. There was no change in the rates of pay in the four months June to September.

N.S.W. BUTTER: PAY TO CREAM SUPPLIERS BY CERTAIN
NORTH COAST FACTORIES.

Pence per lb. of Commercial Butter.

Year	Monthly Pay			Deferred Pay, each month.	Subsidy each month.	Total Pay		
	July	Aug.	Sept.			July	Aug.	Sept.
1935	12	12	$12\frac{1}{4}$	$\frac{3}{4}$	-	$12\frac{3}{4}$	$12\frac{3}{4}$	13
1939	$12\frac{1}{2}$	12	13	$\frac{3}{4}$	-	$13\frac{1}{4}$	$12\frac{3}{4}$	$13\frac{3}{4}$
1941	$13\frac{1}{4}$	13	$12\frac{7}{8}$	$\frac{1}{4}$	-	$13\frac{3}{4}$	$13\frac{1}{2}$	$13\frac{3}{8}$
1942	$13\frac{1}{4}$	$13\frac{1}{4}$	$13\frac{1}{4}$	$1\frac{7}{16}$	$\frac{6}{7}$	$159/16$	$15\frac{9}{16}$	$15\frac{1}{2}$
1943	$13\frac{3}{4}$	$13\frac{3}{4}$	$13\frac{3}{4}$	ø	* $3\frac{1}{4}$	ø	ø	ø

ø Not available until after 31st Dec. 1943. * Interim payment.

PART II - FINANCE AND TRADE.

REAL ESTATE INVESTMENT CONTROL. As a further element in the control of investment in real estate, Federal Treasury approval "to purchase" is to be conditional upon the purchaser having made investments in war loans in accordance with the following scale. The new restriction will not apply to people buying homes for their own occupation or to primary producers acquiring farm lands to work themselves. The scale is applied on the basis of the aggregate purchases of real estate (including the proposed purchase) and the aggregate investments in war loans, since the outbreak of war in September, 1939.

<u>Real Estate Purchases.</u>	<u>War Loan Investments.</u>	<u>Real Estate Purchases.</u>	<u>War Loan Investments.</u>
£	£	£	£
Under 500	NIL	5,000	2,500
500	100	7,000	5,000
1,000	200	Over 10,000	Equal amount.
3,000	1,000		

War loan securities must be lodged and held in a bank until the Treasurer consents to their release. This is to prevent sale of the securities after approval to purchase real estate has been granted.

BOND YIELDS.

Yields as estimated by the Commonwealth Bank on a 2 years and a 12 years Commonwealth security subject to current rates of tax have been steady over a long period.

YIELDS ON COMMONWEALTH GOVERNMENT SECURITIES IN AUSTRALIA.

Subject to Commonwealth Income Tax at Current Rates.

Average in Six months ended.	Short-dated 2 years.	Long-dated 12 years	Last Wednesday in month	Short-dated 2 years.	Long-dated 12 years.
	%	%		%	%
1941-June	2.56	3.23	1943-June	2.48	3.24
December	2.38	3.23	July	2.47	3.23
1942-June	2.41	3.25	August	2.47	3.23
December	2.48	3.24	Sept.	2.47	3.23
1943-June	2.48	3.23	Oct. (20th)	2.48	3.22

SHARE PRICES.

Trading on the Sydney Stock Exchange is restricted by the absence of sellers. The Statistician's Index of Share Prices reflects further gains in September, 1943. viz., 3 points in the Retail Group and one point in each of the groups Pastoral and Finance, Seventy-five companies and Thirty-four active shares.

INDEX OF SHARE PRICES -SYDNEY.

Prices of ordinary shares - excl. banks. Par Value = 100.
(Compiled by N.S.W. Govt. Statistician).

Average for Month.	Manufacturing & Distributing	Retail	Public Utilities	Pastoral & Finance	Insurance	Total 75 Companies	34 Active Shares
1937 - Mar.	214	204	181	169	281	190(a)	201(a)
1939 - Aug.	213	168	156	118	264	174	182
1941 - Sept.	228	177	142	128	253	175	191
1942 - April	176	139	118	112	212	141	150
1943 - June	235	178	141	133	254	180	196
July	235	181	143	133	254	181	198
Aug.	236	189	145	133	254	183	199
Sept.	236	192	145	134	254	184	200

(a) Highest point recorded.

SAVINGS BANK DEPOSITS.

There were further large increases in savings bank deposits in September, 1943, viz., £3.6 m. in N.S.W. and £10.1 m. in Australia.

In the three months ended September, 1943, the deposits in N.S.W. increased by £11.8 m. and in Australia by £34.1 m. The corresponding increases last year were £6.8 m. and £21.1 m., respectively.

SAVINGS BANK DEPOSITS: N.S.W. AND AUSTRALIA.

Period	N.S.W.		AUSTRALIA.	
	Deposits at end of period.	Increase or Decrease(-) in period.	Deposits at end of period.	Increase or Decrease(-) in period.
<u>Year ended June:</u>	£000	£000	£000	£000
1939	87,474	1,458	245,587	5,155
1940	82,111	(-) 5,363	236,991	(-) 8,596
1941	87,750	5,639	252,231	15,240
1942	94,538	6,788	274,275	22,044
1943	122,405	27,867	357,995	83,720
<u>Month:</u> 1942-July	97,331	2,793	282,506	8,231
August	99,727	2,396	290,001	7,495
September	101,385	1,658	295,396	5,395
1943-July	126,689	4,284	370,300	12,305
August	130,519	3,830	382,015	11,715
September	134,163	3,644	392,140	10,125

RETAIL TRADE.

Except for May and June, the monthly sales in 1943 by a group of large Sydney stores have been appreciably lower than last year. For the month of August the decrease was 20.7% and for the eight months ended August, 14.7%.

RETAIL TRADE - EXPERIENCE OF LARGE SYDNEY STORES.

Percentage Increase(+) or Decrease(-) from corresponding period of the previous year.

Year	April	May	June	July	August	Eight Months Jan - Aug.
Value of Sales						
1940	(+) 14.4	(+) 7.0	(-) 2.1	(+) 11.2	(+) 12.7	(+) 6.6
1941	(+) 8.3	(+) 24.2	(+) 38.4	(+) 10.5	(+) 16.3	(+) 16.3
1942	(+) 25.6	(-) 8.7	(-) 19.1	(-) 15.6	(+) 5.7	(+) 1.3
1943	(-) 16.0	(+) 0.8	(-) 1.3	(-) 25.5	(-) 20.7	(-) 14.7
Value of Stock.						
1940	(+) 19.6	(+) 19.2	(+) 20.0	(+) 23.5	(+) 25.5	(+) 18.6
1941	(-) 0.4	(-) 0.5	(+) 1.4	(+) 11.1	(+) 9.5	(+) 3.9
1942	(+) 8.7	(+) 11.5	(+) 10.5	(+) 14.7	(+) 13.4	(+) 13.6
1943	(-) 2.3	(-) 11.1	(-) 11.2	(-) 7.7	(-) 11.4	(-) 4.8

WHOLESALE TRADE.

Sales by traders registered in N.S.W., £18.7 m., in Aug., 1943, declined as compared with July, 1943, and August, 1942, by £1.1 m. and £2.2 m., respectively. Total sales in the eight months ended August, 1943, were £2.6 m. more than in the corresponding period last year.

SALES BY TRADERS REGISTERED UNDER SALES TAX ACTS: N.S.W.TOTAL TAXABLE AND EXEMPT GOODS.

Period	1939	1940	1941	1942	1943
	£ million				
Month - April	15.8	17.9	19.1	19.2	21.9
May	17.5	14.9	18.8	20.7	19.6
June	14.9	17.1	21.8	18.9	20.9
July	15.3	16.7	17.6	19.2	19.8
August	16.8	17.2	20.4	20.9	18.7
Eight months Jan. to Aug.	125.8	131.7	148.3	156.5	159.1

PART III - INDUSTRIES, ETC.EMPLOYMENT.

The estimated number of salary and wage earners employed in N.S.W. (excluding rural employees and household domestics) increased in August, 1943, by 1,600 (viz. males 200 and females 1,400) to 775,700. Government employment was unchanged at the high level recorded in July, a decrease of 700 in the number of males employed being balanced by an increase in females. In Private employment, which had been trending downward since the beginning of the year, there were increases of 900 males and 700 females.

NEW SOUTH WALES.ESTIMATED WAGE & SALARY EARNERS EMPLOYED (EXCL. RURAL WORKERS & HOUSEHOLD DOMESTIC.)

(Includes Civil Constructional Corps in N.S.W.)

End of Month	M A L E S.			F E M A L E S.			T O T A L.		
	Govt. (C'wlth, State, Local & Allied).	Private Employ- ers.	Total	Govt. (C'wlth, State, Local & Allied).	Private Employ- ers.	Total	Govt. (C'wlth, State, Local & Allied).	Private Employ- ers.	Total
	'000	'000	'000	'000	'000	'000	'000	'000	'000
1939-July	136.5	399.1	535.6	19.4	141.3	160.7	155.9	540.4	696.3
1941-July	141.5	419.5	561.0	21.7	186.8	208.5	163.2	606.3	769.5
Nov.	144.3	425.1	569.4	23.0	194.8	217.8	167.3	619.9	787.2
1942-July	158.6	384.3	542.9	29.3	197.0	226.3	187.9	581.3	769.2
Sept.	157.1	381.9	539.0	31.3	196.9	228.2	188.4	578.8	767.2
1943-Jan.	155.6	379.4	535.0	36.4	199.8	236.2	192.0	579.2	771.2
Mar.	156.2	378.0	534.2	38.7	201.2	239.9	194.9	579.2	774.1
June	155.8	375.7	531.5	42.9	200.5	243.4	198.7	576.2	774.9
July	156.6	372.0	528.6	45.8	199.7	245.5	202.4	571.7	774.1
Aug.	155.9	372.9	528.8	46.5	200.4	246.9	202.4	573.3	775.7

x November, 1941, highest recorded. ø September, 1942, lowest since November, 1941.

The estimates indicate that the increases in male and female employment in August were distributed equally between factory and non-factory occupations. The chief movements in factory classifications were increases of 200 males and 400 females in Founding, Engineering, Vehicles, Aircraft, etc., and of 200 males and 100 females in Food, Drink and Tobacco. In non-factory groupings the principal movements were increases in Building and Construction (males 500) and Finance and Commerce, (males 400, females 300) and a decrease in Retail Trade (males 200, females 300).

Movements in the estimated number of salary and wage earners employed in factory and non-factory occupations are shown below.

N.S.W. ESTIMATED FACTORY AND NON-FACTORY EMPLOYMENT.

Excluding Rural employees and Household Domestics.

Month	Factory.			Non-Factory.		
	Males	Females	Totals	Males	Females	Total
	000	000	000	000	000	000
1939 - July	158.8	59.3	218.1	376.8	101.4	478.2
1941 - November	210.5	80.7	291.2	358.9	137.1	496.0
1942 - September	211.9	85.4	297.3	327.1	142.8	469.9
1943 - January	214.4	89.1	303.5	320.6	147.1	467.7
March	215.5	92.1	307.6	318.7	147.8	466.5
June	216.3	93.8	310.1	315.2	149.6	464.8
July	214.8	93.8	308.6	313.8	151.7	465.5
August	214.9	94.5	309.4	313.9	152.4	466.3

GAS AND ELECTRICITY.

The Index of consumption in Sydney and suburbs in September, 1943, was 181, or 9% more than a year ago and 35% more than in September, 1939. The Index, which allows for seasonal variations, was higher in September, 1943, than in any previous month.

INDEX OF CONSUMPTION OF GAS & ELECTRICITY - SYDNEY & SUBURBS.

Period	Average 1929/1931	1939	1941	1942	1943
Year	100	131	148	154	...
March	100	130	143	146	167
June	100	131	150	152	174
July	100	134	149	155	172
August	100	135	151	156	180
September	100	134	151	166	181
December	100	131	153	172	...

TRANSPORT.

Railways. As from 17th October railway services were reduced to effect a saving in coal consumption of 10%, or 3,000 tons weekly. Details of further reductions in services are being determined by State and Federal authorities.

Passenger journeys in September, 1943, were 1.3 m. above last year's level but there were small decreases in goods and livestock tonnages and in gross earnings.

Comparison between the September quarters 1942 and 1943 shows the following increases; viz, passenger journeys 3.5 m, goods and livestock 107,000 tons, gross earnings £330,000. Net earnings, £2,697,000, are lower by £49,000.

N.S.W. GOVERNMENT RAILWAYS.

Year	Month of September.			Three months ended September.			
	Passenger Journeys	Goods & Livestock Tonnage	Gross Earnings	Passenger Journeys	Goods & Livestock Tonnage	Gross Earnings	Net Earnings. £
	Million	000	£000	Million	000	£000	£000
1939	14.3	1,443	1,864	43.9	4,346	5,070	1,541
1940	15.9	1,618	2,004	46.4	5,164	6,057	2,402
1941	18.1	1,583	2,180	52.5	4,355	6,303	2,030
1942	18.7	1,715	3,139	56.9	5,075	8,716	2,746
1943	20.0	1,678	3,021	60.4	5,182	9,046	2,697

£ Gross Earnings less Working Expenses, available to pay Interest, etc., on Railway loan debt, £6.7 m. in 1942-43).

Government Trams & Buses. Net earnings, £60,000, in the two months ended August, 1943, were £37,000 or 38% less than last year. Passenger journeys increased by 3.3 m. but there was an increase of only £3,000 in gross earnings as against £40,000 in working expenses.

N.S.W. GOVERNMENT TRAMS & BUSES - SYDNEY AND NEWCASTLE.

Year	Month of August.				Twelve months ended August.			
	Passenger Journeys	Gross Earnings	Working Expenses	Net Earnings	Passenger Journeys	Gross Earnings	Working Expenses	Net Earnings.
			x	φ			x	φ
	Millions	£000	£000	£000	Millions	£000	£000	£000
1939	30.3	354	314	40	60.0	705	622	83
1940	32.1	368	299	69	63.7	739	613	126
1941	37.6	424	354	70	75.7	852	715	137
1942	40.7	464	417	47	80.4	918	821	97
1943	42.9	468	436	32	83.7	921	861	60

x Excluding Depreciation. φ Gross Earnings less Working Expenses available to pay Depreciation and Int., etc., on Loan Debt, £569,000 in 1942-43).

Motor Registrations. The number of vehicles registered increased by 900 in September, 1943, including 453 cars and 383 lorries and vans. This is the second largest increase since the low point in car registrations in July, 1942; the largest increase was in December, 1942, viz., cars 1,241, lorries and vans 362, all vehicles 1,619. Since July, 1942, the number of cars registered has increased by 4,162, lorries and vans 2,347 and all vehicles 5,541; motor cycles declined by 1,035.

MOTOR VEHICLES REGISTERED IN N.S.W.

Vehicles.	At end of Month.			Increase.			
	Aug. 1939 ★	July 1942 φ	Sept. 1943	July 1943	Aug. 1943	Sept. 1943	Sept. '42 to Sept. '43.
	000	000	000				
Cars	216.6	170.0	174.2	252	293	453	3,919
Lorries & Vans	77.6	70.9	73.2	341	362	383	2,474
All Vehicles	329.2	267.4	272.9	705	650	900	5,616

★ Prewar peak. φ Lowest wartime number of cars.

Few new cars are being registered but the average weekly registrations of new lorries and vans are higher than last year.

NEW MOTOR VEHICLES REGISTERED: AVERAGE WEEKLY NUMBER IN N.S.W.

Year	Cars (incl. Cabs & Omnibuses)				Lorries and Vans.			
	June	July	Aug.	Sept.	June	July	Aug.	Sept.
1939	376	305	322	270	141	133	146	126
1942	29	17	19	16	10	13	9	7
1943	4	6	3	4	45	60	55	60

BUILDING.

Government contracts let in September quarter, 1943, were substantially lower than last year but permits issued for private buildings (including alterations and additions) increased slightly. The combined total of Government contracts and private permits was 20% less than last year's low level and only one-fifth of the amount in September quarter 1941.

ESTIMATED COST OF PROPOSED BUILDINGS, N.S.W. (Recorded Statistics).

New Buildings, Alterations & Additions (except A.R.P.)

Period	Private Building (Permits to Build)		Public Building. (C'w. & State Govts.)		T o t a l.		
	Metrop- olis.	Other N.S.W. (as far as recorded).	Metropolis	Remainder of State.	Metropolis	Other N.S.W. (as far as recorded).	Total
<u>Year ended June:</u>			<u>Thousands of £'s.</u>				
1939	15,333	5,953	Not available.		Not available.		
1940	11,437	5,052	1,053	1,537	12,490	6,589	19,079
1941	12,006	4,623	1,272	2,501	13,278	7,124	20,402
1942	5,969	3,364	1,329	3,640	7,298	7,004	14,302
1943	1,400	468	2,847	2,120	4,247	2,588	6,835
<u>September Qrtr.:</u>							
1939	3,531	1,364	487	168	4,018	1,532	5,550
1940	2,844	1,196	318	1,136	3,162	2,332	5,494
1941	3,140	1,456	449	900	3,589	2,356	5,945
1942	298	78	316	899	614	977	1,591
1943	429	132	403	292	832	424	1,256

The following direction shows that factories account for a large proportion of present private building activity.

PRIVATE BUILDING PERMITS ISSUED IN N.S.W.: ESTIMATED COST.

(Recorded Statistics).

Period	Houses.		Flats, incl. conversions	Hotels, Guest Houses	Shops, incl. dwellings	Factories, Public Garages.	Other (Offices Halls, Hospitals etc.)	Total.
	Brick	Wood, Fibro.						
<u>Year ended June:</u>			<u>Thousands of £'s.</u>					
1940	5,654	3,257	2,543	875	811	1,257	2,092	16,489
1941	6,389	2,752	3,085	698	535	1,488	1,682	16,629
1942	3,870	2,304	987	35	148	1,261	728	9,333
1943	67	201	6	26	32	1,144	392	1,868
<u>September Qtr.</u>								
1940	1,556	705	552	353	123	287	464	4,040
1941	2,111	1,028	577	14	71	523	272	4,596
1942	21	35	1	6	10	253	50	376
1943	13	54	3	7	4	333	147	561

Federal and State housing officials conferred recently to determine whether State and local authorities could conduct surveys to determine the nature and extent of housing requirements. The shortage of houses in Australia has been variously estimated at 250,000 to 300,000.

The intention of the State Government to introduce this session a "Town and Regional Planning Bill" has been announced by the Minister for Local Government.